



# **Financial Aid Presentation**

## **June 12, 2012**

Presented by:  
**Vice Chancellor, Dr. Jacob Ng**

# Financial Aid Data

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As we compare last year's data as of **June 10, 2011** to this year's data as of **June 12, 2012**, the district has increased the number of **FAFSA and enrolled students**, as well as improved its process for **evaluating files** and **disbursing Financial Aid** to students.

Please see data below:

	<b>(2010-11)</b> FAFSA and Enrolled as of 6/10/11	<b>(2011-12)</b> FAFSA and Enrolled as of 6/12/12	<b>(2010-11)</b> Files Evaluated as of 6/10/11	<b>(2011-12)</b> Files Evaluated as of 6/12/12	<b>(2010-11)</b> Checks Received by Students as of 6/10/11	<b>(2011-12)</b> Checks/ Disbursements Received by Students as of 6/12/12
<b>TOTAL</b>	<b>12,470</b>	<b>12,978</b>	<b>12,349</b>	<b>12,901</b>	<b>7,661</b>	<b>8,166</b>



# 2011-12 Financial Aid Data

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2011-2012	Financial Aid Data							June 12, 2012	
	TOTAL FAFSA (DOE Report)	1 - Total FAFSA and Enrolled	2 - Files Evaluated	3 - Files waiting more documents	4 - Files Disqualified	5 - Files Completed & awaiting payments	6 - Total # of students received checks	7 - Files left to be evaluated/verified	
Alameda	5,059	2,340	2,340	185	448	0	1,707	0	
Berkeley	7,474	2,484	2,479	306	634	0	1,539	5	
Laney	11,733	5,563	5,514	2,201	343	15	2,955	49	
Merritt	5,853	2,591	2,568	9	92	0	1,965	23	
<b>Total</b>	<b>30,119</b>	<b>12,978</b>	<b>12,901</b>	<b>2,701</b>	<b>1,517</b>	<b>15</b>	<b>8,166</b>	<b>77</b>	
<b>2010-11 Totals (6-10-11)</b>	N/A	12,470	12,349	2,002	2,415	271	7,661	121	
<b>1 - Students that submitted FAFSA and are enrolled (Sum of 2 &amp; 7)</b>									
<b>2 - Files that are evaluated (Sum of 3, 4, 5 &amp; 6)</b>									
<b>3 - Files that need more documents to be completed</b>									
<b>4 - Files that have been disqualified</b>									
<b>5 - Files that have been completed and are now awaiting payments</b>									
<b>6 - Total number of students that have received their check(s)</b>									
<b>7 - Files that are left to be evaluated and/or verified</b>									

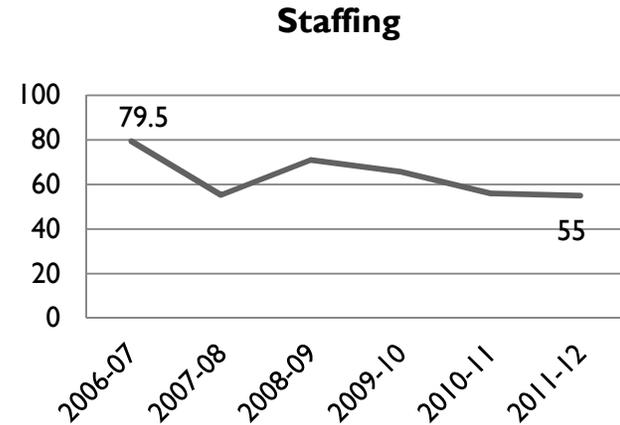
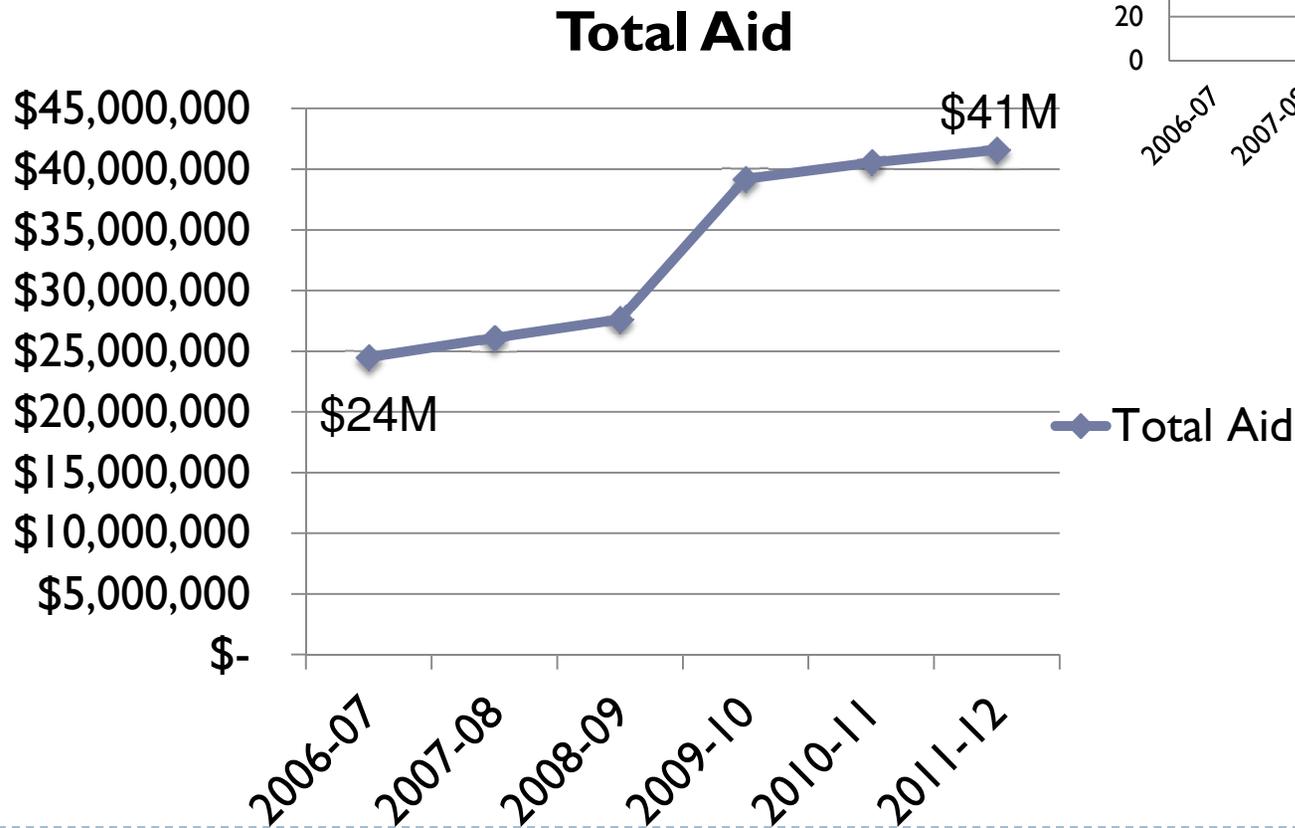


# Financial Aid Data

YEAR	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12 (As of 6/1/12)
Total Staff	79.5	55.25	71	65.75	56	55 (only <b>29 regular</b> )
FTES	19,275	20,142	21,618	23,578	21,379	20,104
FAFSAs	17,016	17,246	20,144	25,177	31,079	Unavailable
Total BOG Fee Waivers	19,503	19,025	21,173	25,874	42,802	Unavailable
Total Awards of Pell Grant	5,343	5,778	5,641	7,090	7,707	7,978
Total Awards of Other Financial Aid	5,219	5,481	5,648	5,168	5,112	Unavailable
Total Awards	30,065	30,284	32,462	38,132	43,626	Unavailable
Total Aid	\$24,499,618	\$26,093,348	\$27,619,958	\$39,189,078	\$40,526,211	<b>\$41,579,300</b> (excludes Summer 2012)

Other Financial Aid Includes: **Academic Competitiveness Grant, Cal Grants, EOPS, Care, Chafee Grant, SEOG, Other Grants, Direct Subsidized/Unsubsidized Loans, Other Loans, Plus Loans, Federal Work Study, Scholarships (Osher, Non-Institutional), CA SWS, EOPS Federal Work Study**

# Financial Aid Data



• There are currently only 29 permanent staff members

# **Financial Aid Updates/Improvements**

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1. Financial Aid PeopleSoft System
2. Lines Updates
3. PeraltaCard – Financial Aid Disbursement
4. Applications/File Evaluation Updates
5. New Complaint Process



# Financial Aid PeopleSoft System

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Objective	Analysis	Solutions	Timeline/Costs
Create a Financial Aid web-based paperless system	Outdated/Old Equipment  The Old system limits the Financial Aid Office in processing and communication to the students.	Upgrade Peoplesoft to version 9.1 as first phase of implementation	<b>Peoplesoft System Implementation by Spring 2014 for Award Year 2014-15</b>



# Lines Updates

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- ▶ Implement **Schedule and Reporting Software (SARS) scheduling functionality by Fall 2012** to reduce the wait times in lines by **texting students** when their appointments are ready, allowing them to better utilize their time instead of waiting in line
- ▶ A TV monitor will also display wait times and appointments
- ▶ **A triage system is currently in place to assess student needs while waiting in line for Specialist or Placement Assistant.**



# FA Disbursement - PeraltaCard

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<b>Implemented : March 1, 2012</b>		
<b><u># of Students</u></b>	<b>8,306</b>	
<b><u>PeraltaCard</u></b>	<b>5,289</b>	<b>64%</b>
<b><u>Paper Checks</u></b>	<b>1,595</b>	<b>19%</b>
<b><u>Direct Deposit</u></b>	<b>1,327</b>	<b>16%</b>
<b><u>Not Active</u></b>	<b>95</b>	<b>1%</b>

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# **Application/File Evaluation Updates**

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- ▶ **Financial Aid Specialists are currently at the Counter to evaluate files on the spot**
- ▶ **New policy and procedures developed District wide.**



# Video

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# New Complaint Process

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- ▶ **New policy and procedure for Complaint process for the student to follow.**
- ▶ All student concerns and complaints are taken seriously in the Financial Aid Offices at the Peralta colleges. Students are encouraged to attempt to resolve their complaints by visiting or calling the college financial aid office to directly resolve their concern. The goal of this informal process is to establish communication between the student and the appropriate staff member for the purpose of providing a resolution to the student's concerns.
- ▶ If a student has a complaint, the procedure is for that student to first contact the Financial Aid Supervisor at the relevant campus. The student should provide detailed information about the complaint, including dates, times, and names of all involved. The supervisor may request that the student provide documentation that substantiates their complaint.
- ▶ If resolution cannot be reached after the student has exhausted all avenues provided by the institution, the student can submit a "Student Complaint Form" to the District Director of Financial Aid. Upon receiving a completed form, the Director will contact the student in a timely manner to schedule an appointment to address the complaint. Appropriate actions and steps will be taken; if necessary, to resolve the issue with the goal of service improvement.
- ▶ If the problem remains unresolved, the Director may refer the student to the Vice Chancellor of Student Services to file a formal written complaint. Students must file formal complaints alleging violation of a college policy or procedure or allegations of staff misconduct within twenty (20) days of the meeting with the District Director of Financial Aid. Complaints received after this time period has expired will be processed only if there are extenuating circumstances.
- ▶ The Peralta Community College District Chancellor and the Governing Board will not investigate a complaint unless the student has exhausted all available grievance procedures outlined above.



# Complaint Form – Summer 2012



## Peralta Community College District

### Student Complaint Form Financial Aid

Date: \_\_\_\_\_

Name: \_\_\_\_\_ Student ID No. \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Email\*: \_\_\_\_\_

**Directions:** Please answer each question listed below. If you need additional space to answer any question, you may attach your response to this document. Be sure to properly label all responses.

**Have you discussed the matter with the Financial Aid Supervisor?** Yes No

• If Yes, on what date? \_\_\_\_\_

• Please give a brief summary of the discussion:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

#### Summary of Concern

It must include each of the following:

- Sufficient detail to identify and clarify the basis of the complaint.
- Include dates, times, and names of all involved.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

#### Resolution Sought

Please describe the solution you are seeking in this grievance.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

*I have read the **Student Complaint Procedures** as outlined on the previous page and understand my right to file a grievance. I understand that it is my responsibility to provide supporting documentation and/or information and materials relevant to my grievance.*

*Furthermore, I understand that the decision made in cases appropriate for the Director of Financial Aid shall be final unless a formal written complaint is filed with the Vice Chancellor of Student Services within three (20) calendar days of receipt of the notification.*

*In addition, I understand that The Peralta Community College District Chancellor and Governing Board will not investigate a complaint unless the student has exhausted all available grievance procedures outlined.*

Signature of Student: \_\_\_\_\_

#### For Office Use Only

Date Received: \_\_\_\_\_ Referral Date (if needed): \_\_\_\_\_

#### Referral to:

Vice Chancellor of Student Services: \_\_\_\_\_

# Qualifications for Financial Aid

(Top 10 things that must be done to qualify for most federal and state aid)

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1. Submit the Free Application for Federal Student Aid (FAFSA)
  2. Submit any other applications (i.e. Verified GPA for Cal Grants)
  3. Demonstrate financial need (except unsub loans)
  4. Have a high school diploma, GED or home-school
  5. Be a U.S. citizen, permanent resident or eligible non-citizen
  6. Be a resident of the state (for state aid only)
  7. Enrolled in an eligible degree or certificate program
  8. Maintain satisfactory academic progress (SAP)
  9. Have a Social Security number
  10. Registered with the U.S. Selective Service for males age 18-25
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# Verification Documents

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- ▶ Verification Worksheet
- ▶ 2011 IRS Tax Return Transcript
- ▶ 2011 W2's
- ▶ Citizenship Documentation
- ▶ INS Documentation
- ▶ Birth Certificates
- ▶ Permanent Resident Cards
- ▶ Social Security Cards
- ▶ Selective Service Confirmation
- ▶ Proof of High School Graduation



# Application Procedures and Deadlines

## 2012-13 Award Year

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- ▶ To be considered for financial aid, students must complete the Free Application for Federal Student Aid (FAFSA) or the renewal application. These applications are usually available beginning in January for the following academic year. If a student is interested in a State of California Grant, the FAFSA and a GPA verification form must be completed. Additional information and eligibility requirements are available at the Financial Aid Office. It is important that California Community College students apply by the **March 2nd Deadline or the September 2nd Deadline. By filing a complete application with all required documentation, students will have priority in the awarding of Federal Work Study and Federal Supplemental Educational Opportunity Grants if eligible, based on submission date.**
- ▶ The information reported on the FAFSA may be verified by the Financial Aid Office using parent's and/or the student's Internal Revenue Service's tax transcript.
- ▶ Students must be able to provide a copy of their Social Security Card, Alien Registration Card (if applicable), and Photo ID for identification purposes.

### **Deadlines:**

- ▶ Supplemental Educational Opportunity Grant (SEOG) apply by **April 1, 2012 \***
- ▶ Federal Work Student (FWS) apply by **April 1, 2012 \***
- ▶ Cal Grant Competitive and Entitlement apply by **March 2, 2012 or Cal Grant Competitive only by September 2, 2012**
- ▶ Pell Grant and Direct Loans – These funds are not limited, you can apply at any time through the Spring term of the award year. The absolute deadline for filing a FAFSA for Pell Grant for the **2012-2013 award year is June 30, 2013.**

**\* SEOG and FWS funds are limited and vary by college. If funds remain after awarding students who have met those deadlines of April 1, 2012, the colleges will continue to make awards on a first-come, first-serve basis.**

- ▶ For your application to be processed timely by the College Financial Aid office, all documents must be submitted by **June 30, 2012 to the Financial Aid office in order to be considered as a complete application to be processed for 2012-13 Award Year.**
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# Requirements and Deadlines

Program	Eligibility Requirements	Annual Awards up to...	Application Deadlines	Forms Required	More Information
Cal Grant B	Undergraduates	\$1,551	March 2 and September 2	FAFSA, <a href="http://www.fafsa.gov">www.fafsa.gov</a> , verified GPA, <a href="http://www.calgrants.org">www.calgrants.org</a>	2.0 high school GPA, financial need
Cal Grant C	Technical and career students	\$3,168	March 2 and September 2	FAFSA, Cal Grant C Supplement Form <a href="http://www.calgrants.org">www.calgrants.org</a>	Financial need
Federal Pell Grant	Undergraduates	\$5,550	Last day of attendance	FAFSA <a href="http://www.fafsa.gov">www.fafsa.gov</a>	Financial need according to your Expected Family Contribution and Cost Of Attendance
Federal Supplemental Educational Opportunity Grant (FSEOG)	Undergraduates	\$4,000	Priority Deadline – First Come First Serve	FAFSA <a href="http://www.fafsa.gov">www.fafsa.gov</a>	Financial need according to your Expected Family Contribution and Cost Of Attendance

# Requirements and Deadlines

Program	Eligibility Requirements	Annual Awards up to...	Application Deadlines	Forms Required	More Information
California Community College Board of Governors Fee Waiver (BOGGFW)	California Community College students and California Residents	Waives enrollment fees	Applications accepted throughout the year	-FAFSA or paper fee waiver application -California Dream App (AB 540 students)	-Financial need -Special qualification eligibility -Income verification or demonstrates \$1,104 of need. -AB 540 students eligible beginning <b>Spring 2013</b>
California Chafee Grant	-You are or were in foster care between ages 16-18 -Demonstrate financial need -Not yet age 22	\$5,000 for job training or college in addition to any other state or federal aid you receive	- Chafee Grant application available at <a href="http://www.chafee.csac.ca.gov">www.chafee.csac.ca.gov</a> -Priority selection for Award	-FAFSA - Does not require a Social Security number - Must stay in school and maintain good grades - Must be enrolled at least half time - Need analysis report - Confirmation of eligible foster care	- <a href="http://www.chafee.csac.ca.gov">www.chafee.csac.ca.gov</a> -Call 1-888-224-7268
Federal Work-Study	Undergraduate	Standardized \$2,500 per student	Priority Deadline – First Come First Serve	FAFSA	Demonstrate financial need; depends on your college's available funds



# Requirements and Deadlines

Program	Eligibility Requirements	Annual Awards up to...	Application Deadlines	Forms Required	More Information
Stafford Loans - Subsidized	Enrolled at least half-time	Dependent Student - \$5,500 - \$6,500 Independent Student - \$9,500 - \$10,500	Last day of attendance	FAFSA, Loan counseling, Master promissory note	Demonstrate financial need.
Stafford Loans - Unsubsidized	Enrolled at least half-time	Dependent Student - \$9,000 Independent Student - \$13,000	Last day of attendance	FAFSA, Loan counseling, Master promissory note	Non-need base



# **New and Updated Policies and Procedures**

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- ▶ **Board Policy and Administrative Procedure 5130**
  - ▶ Awaiting Shared Governance and Board Approval
  
- ▶ **Financial Aid Procedures for Students (SP 5130)**
  - ▶ Awaiting Shared Governance and Board Approval



# AB 130-131 (Cedillo)

2011 Dream Act Implementation

# Education Code Section 68130.5 (AB 540)

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## Determination of AB540 Eligibility

- ▶ Students meeting the following conditions are eligible for resident tuition/fees and for the student aid programs covered in AB131:
  - ▶ attended high school in California for three or more years,
  - ▶ graduated from a California high school or attained the equivalent thereof,
  - ▶ registered at or currently attend an accredited institution of higher education in California not earlier than the fall semester or quarter of the 2001-02 year,
  - ▶ and, if he or she is an alien without lawful immigration status, have filed a prescribed affidavit.



## **AB 130 Dream Act I**

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- ▶ Starting January 1, 2012, a student attending the California Community Colleges who is exempt from paying nonresident tuition would be eligible to receive a scholarship derived from non-state funds received for the purpose of scholarships.



# AB 131 The Dream Act II

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Effective January 1, 2013:

- ▶ Requires California Community College districts to waive the fees of AB540 students who are exempt from nonresident tuition who otherwise qualify for a waiver under this provision based on regulations and procedures adopted by the Board of Governors.
  - ▶ To apply for, and participate in, all student financial aid program administered by the State of California to the full extent permitted by federal law
- ▶ Requires the CSAC (California Student Aid Commission) to establish procedures and forms that enable students who are exempt from paying nonresident tuition.



# AB 131 The Dream Act II

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▶ Prohibits students who are exempt from paying nonresident tuition from being eligible for Competitive Cal Grant A and B Awards unless specified conditions are met.

▶ In Education Code Section 66021.6 (b) the law states:

“The ***number of financial aid awards*** received by California resident students from financial aid programs administered by the segments shall not be diminished as a result of the application of subdivision (a)...”



# Challenges

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- ▶ Identifying and serving existing students (inreach)
- ▶ Identifying and serving potential students (outreach)
  - ▶ Communicating timelines and timeframes
  - ▶ Avoiding confusion and mis-information
- ▶ Disbursement methodology to Undocumented students – ability to open bank accounts, negotiate checks.



# Timeframes

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- ▶ January 2012, AB540 students eligible to apply for and receive non-state scholarships
- ▶ January 2013, AB540 students eligible to apply for and receive state funded segmentally administered FA
- ▶ Spring 2013 Eligible to apply for and receive Cal Grant Entitlement Grants for 2013-14
- ▶ Spring 2013 Eligible to apply for and receive CCCSE/Osher Scholarships for 2013-14



## CSAC Dream App

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- ▶ CSAC, will rely upon existing institutional determinations of AB540 eligibility.
- ▶ Undocumented AB540 students cannot file a FAFSA because they do not have a SSN.
- ▶ CSAC is developing an on-line application that will mirror the FAFSA that undocumented students can complete in order to have their financial need determined.
- ▶ Although AB540 students will not be eligible to apply for Cal Grants until the 2013-14 academic year, CSAC is developing the application now so that it is available for use by the segments in time for awards to be made during 2012-13.



## **CSAC Dream App (cont)**

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- ▶ Students will be randomly assigned a pseudo SSN, with three leading zeros, in place of the SSN.
- ▶ CSAC will make available via WebGrants a “California ISIR” to all colleges the student lists on the Dream App.
- ▶ On February 3, 2012, CSAC sent the Cal ISIR record layouts to all colleges.
- ▶ CSAC has also contacted the financial aid management system providers and are encouraging them to adopt enhancements to their systems that will allow colleges to download, track and process the Cal ISIR.



## **CSAC Dream App (cont)**

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- Colleges will be expected to use the Expected Family Contribution (EFC) calculations resulting from Dream App applications for use in determining Part C eligibility for the BOG Fee Waiver for AB540/131 students.

